



## **EXERCISE 1: HIRE EVENT (HIR)**

### **STEP 1: HIRE THE EMPLOYEE USING ND HIRE**

**Navigation: Administer Workforce>Administer Workforce GBL>Use>ND Hire**

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a HIR event, enter HIR in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment.

### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Since this is your first time, you will need to Add the Run Control ID. Make the Run Control ID the same as the Schedule ID
2. Once created, the Run Control ID can be reused.
3. Enter your Schedule ID in the Schedule ID field.
4. BAS Type will always be "Process Existing Events Only"
5. Company and BAS Group ID will automatically fill in.
6. Press the Run button to take you to the Process Scheduler.
7. Select Server Name "PSNT" if it is not already selected.
8. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).



9. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
10. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a HIR event, enter HIR in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your HIR event should now be Prepared (PR). This means that benefits can now be elected.

### **STEP 6: PRODUCE ENROLLMENT STATEMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Report>Enrollment Statement**

1. Enter your Run Control ID. This can be the same ID as you used for the Ben Admin process.
2. Enter your Schedule ID in the Schedule ID field.
3. Leave the Emplid field blank. This will produce Enrollment Statements for all employees within your schedule who are Prepared, but not Notified.
4. Press the Run button to take you to the Process Scheduler.
5. Make sure that **Type = Web**, and **Format = PDF**.
6. Press OK to begin the process. After you press OK, you will be taken back to the Run Control page.
7. Press "Process Monitor" to view the status of the process.
8. When the process has finished successfully, press "Details", then "View log/trace" to find and select the .PDF file. Doing so will launch Acrobat where you can view and print the Enrollment Statement.

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Note: this Enrollment Statement does NOT replace the usual PERS or other provider forms. It will be used by you as a data entry tool. In real life, you will transfer employee elections from those forms onto the Enrollment Statement for ease of data entry.

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## STEP 7: ELECT OPTIONS

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of the new hire and press Search.
3. This will take you to the Option Election page. Enter the Option Code for each of the plan types, or use the look-up to find the appropriate option. You will only see eligible options.
4. Refer to Appendix B in the Training Guide for what the default options are. You do not have to enter elections for EAP, Basic Life, Leave, or Retirement. These will automatically default.
5. Make sure to enter coverage amounts for the Life, Savings, and FSA plans.
6. If you choose other than Single coverage for the Health Plan Types, you can go to the Dependents/Beneficiaries tab and add/enroll dependents.
7. After you have finished with your elections, make sure to press Save.
8. The event Process Status will now change to Entered (ET).

## STEP 8: FINALIZE/ENROLL

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## STEP 9: VERIFY FINALIZED EVENT

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**



1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a HIR event, enter HIR in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your HIR event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is:

**Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages**

5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control**.
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

## **STEP 10: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date
  - c. Deduction begin date
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan elected
  - f. Coverage Code = Coverage elected
  - g. Amounts for Life, Savings, or FSA will be the amounts elected.
  - h. Enrolled dependents where appropriate.



## **EXERCISE 2: FAMILY STATUS CHANGE EVENT (FSC)**

In this exercise, you will process a Family Status Change event such as marriage, divorce, birth, adoption, etc. The process steps you follow will be the same as with the HIR event. However, there will be a very narrow range of options the employee is eligible to elect. These would be changes to medical, dental, or vision coverage; enrolling in, or opting out of Dependent and Supplemental Life; and enrolling in or opting out of FSA.

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Note: this is a new Job Action that is used exclusively for Benefits Administration.

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### **STEP 1: FAMILY STATUS CHANGE JOB ACTION**

**Navigation: Administer Workforce>Administer Workforce GBL>Use>Job Data**

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a FSC event, enter FSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS)
5. Validate Benefit Program assignment.

### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID. Your Run Control ID should be the same as your Schedule ID.
2. Enter your Schedule ID in the Schedule ID field.



3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

### STEP 5: VERIFY PREPARE OPTIONS

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a FSC, enter FSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your FSC event should now be Prepared (PR). This means that benefits can now be elected.

### STEP 6: PRODUCE ENROLLMENT STATEMENT

**Navigation: Compensate Employees>Administer Automated Benefits>Report>Enrollment Statement**

1. Enter your Run Control ID. This can be the same ID as you used for the Ben Admin process.
2. Enter your Schedule ID in the Schedule ID field.
3. Leave the Emplid field blank. This will produce Enrollment Statements for all employees within your schedule who are Prepared, but not Notified.
4. Press the Run button to take you to the Process Scheduler.
5. Make sure that **Type = Web**, and **Format = PDF**.
6. Press OK to begin the process. After you press OK, you will be taken back to the Run Control page.
7. Press "Process Monitor" to view the status of the process.
8. When the process has finished successfully, press "Details" then "View log/trace" to find and select the .PDF file. Doing so will launch Acrobat where you can view and print the Enrollment Statement.



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Note: this Enrollment Statement does NOT replace the usual PERS or other provider forms. It will be used by you as a data entry tool. In real life, you will transfer employee elections from those forms onto the Enrollment Statement for ease of data entry.

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## **STEP 7: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid for your FSC employee and press Search.
3. This will take you to the Option Election page. Enter the Option Code for each of the plan types, or use the look-up to find the appropriate option. You will only see eligible options that are allowed for the FSC.
4. Make sure to enter coverage amounts for the Life, Savings, and FSA plans.
5. If you elect a different coverage for medical, dental, or vision, you can go to the Dependents/Beneficiaries tab and add/enroll/remove dependents.
6. After you have finished with your elections, make sure to press Save.
7. The event Process Status will now change to Entered (ET).

## **STEP 8: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.



## **STEP 9: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a FSC event, enter FSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your FSC event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is:

**Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages**

5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control**.
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

## **STEP 10: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, FSA Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date
  - c. Deduction begin date.
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan Elected
  - f. Coverage Code = Coverage elected
  - g. Amounts for Life, or FSA will be the amounts elected.
  - h. Enrolled dependents where appropriate.





### **EXERCISE 3: PAY RATE CHANGE (MSC)**

In this exercise, you will process a Pay Rate change action on the Job record. This is a MSC event. The process steps you follow will be somewhat different than for the HIR or FSC event. This is because the Pay Rate change event should result in no change in benefit eligibility. With a few exceptions, after the event is scheduled, it should move directly to the Finalized/Enrolled (FE) Process Status, and the event will close.

#### **STEP 1: PAY RATE CHANGE JOB ACTION (MSC)**

**Navigation: Administer Workforce>Administer Workforce GBL>Use>Job Data**

#### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

#### **STEP 3: VALIDATE PROCESS STATUS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a MSC event, enter MSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate that the Process Status is Prepare None (FP), and the Event Status is Closed. This is the typical result. If the event is closed, then you are done.
4. If the Process Status is Prepared (PR), don't panic. Just click on Final/Dflt, Save the page, and go to the next step to finalize the event.

#### **STEP 4: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.



7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## **STEP 5: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a MSC event, enter MSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your MSC event should now be Finalized/Enrolled (FE) and the Event Status is Closed.



## **EXERCISE 4: POSITION CHANGE JOB ACTION (MSC)**

In this exercise, you will process a Position change Job action which will trigger a MSC event. A position change can be the result of any number of Job actions—promotion, demotion, transfer, etc.

This is what you can expect to happen:

- For each employee, Ben Admin will determine what the employee is newly eligible or newly ineligible for.
- For a benefited employee moving into a non-benefited position, a new program will be assigned; they will become newly eligible for the temporary benefit options; and they will become newly ineligible for their current coverage. When election options, you will see that they can now only elect those few options available to non-benefited employees. Their current elections will be automatically terminated when you finalize the event, and they will be enrolled into any newly elected options.
- For a non-benefited employee moving into a benefited position, the same thing will happen. The difference is that they will be able to elect the options available to a benefited employee. Any options they elected as a temp employee will be automatically terminated when you finalize the event.

### **STEP 1: POSITION CHANGE JOB ACTION**

**Navigation: Administer Workforce>Administer Workforce GBL>Use>Job Data**

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a MSC event, enter MSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)



- b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment. You should see that the program assignment is different than what it was before the position change.

#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID. Your Run Control ID should be the same as your Schedule ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For MSC events, enter MSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your MSC events should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: PRODUCE ENROLLMENT STATEMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Report>Enrollment Statement**

1. Enter your Run Control ID. This can be the same ID as you used for the Ben Admin process.



2. Enter your Schedule ID in the Schedule ID field.
3. Leave the Emplid field blank. This will produce Enrollment Statements for all employees within your schedule who are Prepared, but not Notified.
4. Press the Run button to take you to the Process Scheduler.
5. Make sure that **Type = Web**, and **Format = PDF**.
6. Press OK to begin the process. After you press OK, you will be taken back to the Run Control page.
7. Press “Process Monitor” to view the status of the process.
8. When the process has finished successfully, press “Details” then “View log/trace” to find and select the .PDF file. Doing so will launch Acrobat where you can view and print the Enrollment Statement.

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Note: this Enrollment Statement does NOT replace the usual PERS or other provider forms. It will be used by you as a data entry tool. In real life, you will transfer employee elections from those forms onto the Enrollment Statement for ease of data entry.

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## STEP 7: ELECT OPTIONS

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid and press Search.
3. This will take you to the Option Election page. Enter the Option Code for each of the plan types, or use the look-up to find the appropriate option. You will only see eligible options that are allowed for the MSC. For your new benefited employee, you should see all options—like you would for a new hire. For your new non-benefited employee, you should see only those options offered to a non-benefited employee.
4. Refer to Appendix B in the Training Guide for what the default options are. You do not have to enter elections for EAP, Basic Life, Leave, or Retirement. These will automatically default.
5. Make sure to enter coverage amounts for the Life, Savings, and FSA plans.
6. If you elect a different coverage for medical, dental, or vision, you can go to the Dependents/Beneficiaries tab and add/enroll/remove dependents.
7. After you have finished with your elections, make sure to press Save.
8. The event Process Status will now change to Entered (ET).



## STEP 8: FINALIZE/ENROLL

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## STEP 9: VERIFY FINALIZED EVENT

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a MSC event, enter MSC in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your MSC event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is:

**Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages**

5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control**.
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.



## **STEP 10: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date
  - c. Deduction begin date.
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan Elected
  - f. Coverage Code = Coverage elected
  - g. Amounts for Life, or FSA will be the amounts elected.
  - h. Enrolled dependents where appropriate.
3. For each plan type where the employee was newly ineligible, a termination row will be automatically inserted.



## **EXERCISE 5: TERMINATION EVENT (TER)**

This is where it all ends. In this exercise, you will terminate the employee by entering a termination action in the Job record. Doing so will trigger the TER event to Ben Admin.

The termination event works a bit differently than other Ben Admin events in that you do not have to Prepare Options, or Elect Options. You will just schedule the event, and then force finalize it to close it. When the event is closed, Ben Admin will automatically create a termination row in each of the employee's benefit enrollments.

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Note: This second step—force finalize—is important in that it will give you time to make sure that you really want to terminate the employee.

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### **STEP 1: TERMINATION JOB ACTION**

**Navigation: Administer Workforce>Administer Workforce GBL>Use>Job Data**

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

### **STEP 3: VALIDATE PROCESS STATUS AND PREPARE FOR FINALIZATION**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a TER event, enter TER in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate that the Process Status is Prepared, the benefit program is SAN and that the Event Status is Open. It now awaits your final approval.
4. Click on the Final/Dflt box and Save the page. This will “force finalize” the termination event.
5. Once you click on Final/Dflt, the termination event is ready to be processed and finalized.
6. But first, ask yourself (and maybe the employee) if this is what is to be done.





#### **STEP 4: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only"
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration "PSPBARUN" process by clicking on the box towards the bottom of the page (if you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY BASE BENEFITS TERMINATION**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee's benefit enrollments have been terminated. You will not change anything here.
  - a. For each of the plan types where there was an election, you should now see the termination row.



## **Exercise 6: Manual Event (PRN) - Enrolling an Employee into the Deferred Compensation Program.**

In this exercise, you will enroll an individual into the deferred compensation program. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

### **STEP 1: MANUALLY INSERT PRN EVENT INTO BAS ACTIVITY.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit search button at the bottom of the page.
2. Action Source will fill in to read "Manual". Enter the pay period beginning date that is indicated in Section 5 of the Participant Agreement form (sfn 3803) as the Event Date.
3. Enter PRN (as needed enrollments) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour 24 hours a day, 7 days a week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS)
5. Validate Benefit Program assignment.



#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRN and press Search.
3. This will take you to the Option Election page. Find Plan Type 4B (457 Plan 1), 4C (457 Plan 2) or 4D (457 Plan 3). Enter the Option Code for the provider the employee has chosen, or use the look-up to find the appropriate option. Enter the amount in the Before-tax: Flat Amount box. Remember, you should not record beneficiary information, as the provider company retains that



information. The other plan types will default to what the employee currently has; these should be left untouched.

4. After you have finished with the election, make sure to press Save.
5. The event Process Status will now change to Entered (ET).

#### **STEP 7: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process).
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: **Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control.**



6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

#### **STEP 9: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Savings Plans**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date = Date taken from Participant Agreement SFN 3803 (Part 5)
  - c. Deduction begin date = Pay period begin of current pay period.
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan elected
  - f. Coverage Code = Coverage elected



## **Exercise 7: MANUAL EVENT (PRT) TERMINATING CONTRIBUTIONS TO THE DEFERRED COMPENSATION PROGRAM.**

In this exercise, you will terminate participation for an individual who no longer wants to contribute to the deferred compensation program. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

### **STEP 1: MANUALLY INSERT PRT EVENT INTO BAS ACTIVITY.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read "Manual". Enter the pay period beginning date that is indicated in Section 5 of the Participant Agreement form (sfn 3803) as the Event Date.
3. Enter PRT (as needed terminations) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour, 24 hours per day, 7 days per week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment.



#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRT and press Search.
3. This will take you to the Option Election page. Remove the Option Code for the deferred compensation program you will be terminating participation in. Also be sure to remove the amount from the contribution section. The other plan types will default to what the employee currently has; these should be left untouched.
4. After you have finished with your termination(s), make sure to press Save. You may receive a warning that no changes were made. Click ok and the save process should complete.



5. The event Process Status will now change to Entered (ET).

#### **STEP 7: FINALIZE/ENROLL**

**NAVIGATION: COMPENSATE EMPLOYEES>ADMINISTER AUTOMATED BENEFITS>PROCESS>RUN CONTROL**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: **Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control.**
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.





## **STEP 9: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date = Date you want coverage to be terminated.
  - c. Deduction begin date = Pay period begin of current pay period.
  - d. Coverage Election = Terminate



### **Exercise 8: Manual Event (PRN) - Changing Amount of Deferral in the Deferred Compensation Plan or Coverage Amounts for Insurance.**

**(This exercise can be followed when changing Deferred Comp Providers, Deferred Comp deferral amounts, or coverage amounts for supplemental, dependent, or spouse life insurance)**

In this exercise, you will change the deferral amount for an individual in the deferred compensation plan. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

#### **STEP 1: MANUALLY INSERT PRN EVENT INTO BAS ACTIVITY.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read as "Manual". Be sure to enter the pay period beginning date that is indicated in Section 5 of the Participant Agreement form (sfn 3803) as the Event Date.
3. Enter PRN (as needed enrollments) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

#### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour, 24 hours per day, 7 days per week.

#### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:



- a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
- b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS)
5. Validate Benefit Program assignment.

#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Process OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Prepared (PR). This means that benefits can now be elected.



## **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRN and press Search.
3. This will take you to the Option Election page. Go to the appropriate Savings Plan and enter the deferral amount over the top of the old amount. If you are changing deferred compensation providers, replace the old provider code with the new provider code. Remember, you should not record beneficiary information, as the provider company retains that information. The other plan types will default to what the employee currently has; these should be left untouched.
4. After you have finished with the change(s) in deferral, make sure to press Save.
5. The event Process Status will now change to Entered (ET).

## **STEP 7: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.



## **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is:  
**Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control**.
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

## **STEP 9: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits with the correct deferral amount. You will not change anything here.
2. For each of the plan types where there was an election, you should see a new effective dated enrollment record.
3. Plan type
4. Coverage begin date = Date taken from Participant Agreement SFN 3803 (Part 5)
5. Deduction begin date = Pay period begin of current pay period.
6. Coverage Election = Elect
7. Benefit Plan = Plan elected
8. Coverage Code = Coverage elected



### **Exercise 9: Manual Events (PRN) - Enrolling an Employee into the Defined Contribution Retirement Plan and (PRT) – Terminating coverage in Defined Benefit Retirement Plan.**

In this exercise, you will enroll an individual into the defined contribution retirement program by adding a PRN event. Participation in the Defined Benefit Program must also be terminated after enrolling the participant in the Defined Contribution Retirement Plan by using a PRT event. You will have to manually insert these events into the Manual Events table to ensure proper processing.

#### **STEP 1: MANUALLY INSERT PRN AND PRT EVENT INTO BAS ACTIVITY.** (May be done separately also, depending upon your preference.) **Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read “Manual”. Enter date coverage is to begin in the Defined Contribution Plan as the Event Date. (This date will be provided on the notification you receive from NDPERS.)
3. Enter PRN (as needed enrollments) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save the screen.
6. If you wish to enter both events at the same time, press the add button (+) at the bottom of the page and again enter Empl Id and Event Date, repeating steps 1 – 3, except instead of selecting “PRN” select “PRT”. Save this screen. As you learned in earlier exercises, PeopleSoft will only process one event at a time. Because enrollments are processed before terminations, we will do the enrollment first.

#### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour, 24 hours per day, 7 days per week.

#### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT** **Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.



3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment.

#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRN and press Search.



3. This will take you to the Option Election page. Use the lookup feature on the Defined Contribution Retirement Plan to select participation or enter "1" in the blank provided. *Do not remove the Defined Benefit Plan participation at this time.* The rest of the plan types will default to what the employee currently has and should be left untouched.
4. After you have finished with your election, make sure to press Save.
5. The event Process Status will now change to Entered (ET).

## **STEP 7: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: **Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem,





you will need to rerun the Ben Admin process by going back to **Process>Run Control**.

6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

## **STEP 9: TERMINATING COVERAGE IN THE DEFINED BENEFIT PLAN**

1. If you did not already do so, it will be necessary for you to add a PRT event in BAS Activity for the purpose of terminating participation in the Defined Benefit Program (Steps 1 and 2 at the beginning of this exercise.) If you have already done so, proceed through Steps 3-5.
2. On Step 6, delete the Option Code under Plan Type 70. The rest of the plan types will default to what the employee currently has and should be left untouched.
3. Proceed through Steps 7 and 8.

## **STEP 10: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. You should see an enrollment record for the defined contribution plan.
  - a. Plan type
  - b. Coverage begin date = Date taken from NDPERS Defined Contribution Election Notification letter.
  - c. Deduction begin date = Same date as coverage begin date.
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan elected
  - f. Coverage Code = Coverage elected
3. For the defined benefit plan where there was a termination in participation, you should also see a record.
  - a. Plan type
  - b. Coverage begin date = Date you want coverage to be terminated.
  - c. Deduction begin date = Same as coverage begin date.
  - d. Coverage Election = Terminate



### **Exercise 10: Manual Event (PRN) - Enrolling in Benefits After First Payroll has been processed, but within the 31 Day Enrollment Period.**

In this exercise, you will process an individual who was not able to get the necessary paperwork back to you before it was necessary to close out payroll. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

#### **STEP 1: INSERT PRN EVENT INTO MANUAL EVENTS.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read "Manual". Be sure to enter Hire Date as the Event Date.
3. Enter PRN (as needed enrollments) as BAS Action or select it from the look up feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

#### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour, 24 hours per day, 7 days per week.

#### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment.



#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process!)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. As you will have already run an enrollment statement during the Hire process, it is not necessary to do so again. Enter your Schedule ID.
2. Enter the Emplid of your PRN and press Search.
3. This will take you to the Option Election page. Enter the Option Code for each of the plan types that you will be enrolling the employee into, or use the look-up to find the appropriate option. The rest of the plan types will default to what the employee



- currently has. Make sure to enter coverage amounts for the Life, Savings, and FSA plans.
4. If you choose other than Single coverage for the Health Plan Types, you can go to the Dependents/Beneficiaries tab and add/enroll dependents.
  5. After you have finished with your elections, make sure to press Save.
  6. The event Process Status will now change to Entered (ET).

## **STEP 7: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process!)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRN event, enter PRN in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRN event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: **Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**



5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control**.
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.

## **STEP 9: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date = Month begin after the hire date.
  - c. Deduction begin date = Pay period begin of current pay period.
  - d. Coverage Election = Elect
  - e. Benefit Plan = Plan elected
  - f. Coverage Code = Coverage elected
  - g. Amounts for Life, Savings, or FSA will be the amounts elected.
  - h. Enrolled dependents where appropriate.



## **Exercise 11: MANUAL EVENT (PRT) TERMINATING BENEFITS AN EMPLOYEE NO LONGER WANTS.**

In this exercise, you will terminate coverage for an individual who no longer wants coverage in a particular benefit plan. Participation in FlexComp, or any insurance coverage that the premium is being pre-taxed, can only be terminated during annual enrollment. This event deviates from other Ben Admin events because there will be no Job action to trigger an event. You will have to manually insert an event into the Manual Events table so it can be processed properly.

### **STEP 1: MANUALLY INSERT PRT EVENT INTO BAS ACTIVITY.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>Manual Events**

1. Enter EmplID of employee and hit Search button at the bottom of the page.
2. Action Source will fill in to read "Manual". Enter event date. Using the current date as the event date will stop the coverage for the next pay period.
3. Enter PRT (as needed terminations) as BAS Action or select it from the lookup feature.
4. The rest of the fields will default in with the appropriate information – they should not be changed.
5. Save this screen.

### **STEP 2: ASSIGN EVENTS TO A SCHEDULE**

1. This is an automated activity.
2. Scheduling will occur on the hour and the half hour, 24 hours per day, 7 days per week.

### **STEP 3: VALIDATE SCHEDULE AND PROGRAM ASSIGNMENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update.**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. Validate the schedule assigned. It should be:
  - a. First 3 numbers of the Business Unit followed by EM, if you are a State Agency (e.g., 110EM)
  - b. Company ID followed by EM if you are a Campus (e.g., MAYEM).
4. Validate Process Status. It should be Program Assigned (AS).
5. Validate Benefit Program assignment.



#### **STEP 4: PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

#### **STEP 5: VERIFY PREPARE OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Prepared (PR). This means that benefits can now be elected.

#### **STEP 6: ELECT OPTIONS**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry**

1. Enter your Schedule ID.
2. Enter the Emplid of your PRT and press Search.
3. This will take you to the Option Election page. Remove the Option Code for the benefit plan you will be terminating participation in. Also be sure to remove any coverage amounts for life insurance. The rest of the plan types will default to what the employee currently has and should be left untouched.



4. After you have finished with your termination(s), make sure to press Save.
5. The event Process Status will now change to Entered (ET).

## **STEP 7: FINALIZE/ENROLL**

**Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control**

1. Enter your Run Control ID.
2. Enter your Schedule ID in the Schedule ID field.
3. BAS Type will always be "Process Existing Events Only".
4. Company and BAS Group ID will automatically fill in.
5. Press the Run button to take you to the Process Scheduler.
6. Select Server Name "PSNT" if it is not already selected.
7. Select the Benefits Administration PSPBARUN process by clicking on the box towards the bottom of the page. (If you do not select the last process in the list, your schedule will not process.)
8. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
9. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

## **STEP 8: VERIFY FINALIZED EVENT**

**Navigation: Compensate Employees>Administer Automated Benefits>Use>Event Status Update or Processing Controls Update**

1. If you use Event Status Update, you will enter the Emplid and press Search.
2. If you use Processing Controls Update, you will enter Schedule ID, and Emplid (or one of the other selection criteria). For a PRT event, enter PRT in the Event Class field. After you press Search, you will be taken to the event(s) that match your search criteria.
3. The Process Status for your PRT event should now be Finalized/Enrolled (FE) and the Event Status is Closed.
4. If you have a Process Status of Elect Error (EE), you will need to view Messages to see what the problem is: **Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Messages.**
5. If there is an Election Error, you will need to correct the error by going back to the Election Entry page. Once you fix the problem, you will need to rerun the Ben Admin process by going back to **Process>Run Control.**
6. If you have no errors, and the event is closed, then the employee is enrolled in the Base Benefits records.





## **STEP 9: VERIFY BASE BENEFITS ENROLLMENT**

**Navigation: Compensate Employees>Administer Base Benefits>Use (Health Plans, Life and ADD, Leave Plans, etc.)**

1. The purpose of this step is to verify that the employee is enrolled into Base Benefits. You will not change anything here.
2. For each of the plan types where there was an election, you should see an enrollment record.
  - a. Plan type
  - b. Coverage begin date = Date you want coverage to be terminated.
  - c. Deduction begin date = Pay period begin of current pay period.
  - d. Coverage Election = Terminate



## **EXERCISE 12: ON DEMAND EVENT MAINTENANCE**

In this exercise, you will process an employee who had a job data change, which resulted in an open event for this person. You discovered this when you were checking for open events using Processing Controls Update. On Demand will be very useful to you in processing a single employee. It will not work for processing groups of employees.

### **STEP 1: GO TO ON DEMAND EVENT MAINTENANCE.**

**Navigation: Home>Compensate Employees>Administer Automated Benefits>Use>On Demand Event Maintenance**

1. Enter Empl ID of employee and hit Search Button at the bottom of the page.
2. Click on yellow Event Status Update button. This will take you to Event Status Update where you can view status of employee.
3. Click on the yellow OK button at the bottom of the page. You will return to the original On Demand Event Maintenance page. Yellow buttons will indicate the choice of actions you have.
4. If status is "Program Assigned" click on the yellow Prepare Options button.
5. If the event does not have an affect on benefits (such as a pay rate change), the status will change to 'Finalized-Prepared None' and the event will close. All the buttons on this page will be grayed out. No further action is needed.
6. If the event does have an affect on benefits, benefit options will be prepared. You will then need to click on the yellow Election Entry button and enter the benefit elections. Once you have entered the benefit elections, click on the yellow OK button at the bottom of the page. You will return to the original On Demand Event Maintenance page. The status will have changed to entered.
7. If you are finished entering the benefit elections, click on the yellow Validate/Finalize button. After the process runs, the status will change to "Finalized/Enrolled" and the event will close. No further action is needed.

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NOTE: You **cannot** print an enrollment statement or confirmation statement through On Demand Event Maintenance. If you want to print an enrollment/confirmation statement, you will need to use Home>Compensate Employees>Administer Automated Benefits>Reports.

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8. When processing terminations, you will need to check the Finalize/Apply Defaults box. Then you need to click on the yellow button for Validate/Finalize. After the process runs, the status will change to "Finalized-Enrolled". No further action is needed.



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If you notice that all buttons are grayed out and you need to complete additional processing to close out an event, it may be necessary for you to go all the way back to On Demand Event Maintenance and hit search again to refresh the page. When processing more than one event for an employee, we have found this to be necessary. After you do this, you will be able to access the necessary yellow buttons to continue processing.

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